**SFA Modernization Partner Program
Monthly Management Services Summary
For the Month of November 2001**

December 10, 2001

38.3.2f- PROGRAM MANAGEMENT SERVICES SUMMARY

TABLE OF CONTENTS

I. INTRODUCTION

This report covers the month of November 2001 and includes the following:

- Information on overall project completions/implementations for this reporting period.
- Major milestones achieved during the month.
- Program level risks and issues.
- Monthly scorecards.
- Significantly late deliverables.

This report format is the result of a collaborative effort between SFA and Modernization Partner executives to improve the information provided to SFA Executives. We will continue to refine these monthly summaries to improve their usefulness and value. Please provide any suggestions regarding these reports to the SFA Modernization Partner Program Manager (eric.l.stackman@accenture.com or 202-962-0624).

II.   PROJECT COMPLETIONS/ IMPLEMENTATIONS FOR THIS REPORTING PERIOD

This section reports on the completion or implementation of Modernization Partner projects.

CIO

- Completed Portal Strategy Phase II, which validated the SFA decision made in Phase I to select IBM WebSphere as the SFA portal standard. SFA's earlier portal standard components from Viador and Jrun were removed so that the School Portal can operate with WebSphere. This phase also developed seven reusable portal service components (registration, login, personalization, calendar, headlines, frequently asked questions and search) for addition to the Reusable Common Services (RCS) framework, and is maintained by the Integrated Technical Architecture (ITA) team.
- Completed the Enterprise Architecture Integration (EAI) Release 2 project, which connected an additional four legacy systems (FMS, eCBS, eMPN, and P-Note Imaging) to the EAI Bus, and also completed messaging and programming standards for EAI architecture.

SCHOOLS

- Transitioned the responsibility for the operation and maintenance of the eCampus Based website to the SFA Operating Partner, INDUS Corporation, based on SFA's requirements. The transition included a formal series of technical transition meetings.

STUDENTS

- Implemented the pilot code for Electronic Bill Presentment and Payment on November 19, 2001, and will soon be ready for pilot testing.

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III.   VALUE POINTS

This section reports value delivered above and beyond anticipated activities.

CFO
- SFA and Modernization Partner representatives presented a paper to the Oracle Applications Users Group (OAUG) on November 29, 2001. The paper highlighted SFA's successful work with state agency partners to improve information flow using the eGovernment attributes of Oracle Federal Financials.

CIO
- Completed a security risk assessment for FAFSA on the Web Release 6.0 on November 23, 2001, to ensure that the application does not present any security risk exposures.
- SFA and Modernization Partner presented reusable common services to the Software Developers' Conference in Reno, NV.

PROGRAM MANAGEMENT
- Continued to support the SFA CIO Technical Handbook IPT.
- Participated in the Electronic Access Conferences (EAC) in Reno, NV from November 5-7, 2001, and Baltimore, MD from November 27-29, 2001, which Modernization Partner financially supported through advertisers.

SCHOOLS
- Conducted a workshop for all interested SFA and Modernization Partner personnel on EAI and COD Integration. This workshop provided an overview of EAI and discussed the relationship between the EAI and COD.

STUDENTS
- Organized a Siebel 7.0 (Siebel 2001) Overview for Modernization and Department of Education personnel on November 14, 2001.
- Participated in the CIO/Ombudsman customer planning session at the CSC Executive Briefing Center on November 15, 2001. The session was designed to help the SFA CIO develop a comprehensive customer account plan for the office of the Ombudsman.

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IV.   MAJOR PROJECT MILESTONES ACHIEVED

This section presents Modernization Partner's significant accomplishments on a Channel-by-Channel basis. These milestones may include the completion of a project phase or the acceptance of a major deliverable in line with the project's workplan.

CIO

- Completed Department of Education accessibility testing, system testing, and acceptance testing for FAFSA on the Web Release 6.0.
- Completed five performance test cycles for FAFSA on the Web Release 6.0, validating the performance and scalability of the system.
- Completed all necessary activities for the Beta application for FAFSA on the Web Release 6.0 on November 30, 2001 as planned. The system will be available for all Beta users on December 3, 2001.
- Submitted the EAI Enablement Guide to SFA that defines procedures to enable SFA business applications to connect to the EAI Core Architecture, documents steps to design and build interfaces between business applications and legacy systems, and identifies the procedures to identify the business rules for the interface between SFA business applications and legacy systems.
- Submitted the EAI Build and Test Report to SFA that documents test conditions and expected results for the overall EAI Core Architecture, and outlines major findings, lessons learned, and key success factors identified during the EAI Core Architecture Build and Test.
- Successfully completed performance testing of the EAI capability on the LO Web System. COD will use this interface for credit checks for PLUS loans.
- Completed a first draft of a Consistent Data Strategy overview for modernization.
- Completed the Data Mart Integration Framework, including identification of common dimensions that should be targeted for all future data marts or data mart enhancements.
- Defined the Architecture Working Group (AWG)/Architecture Support Group (ASG), with the help of the Business Technology Alignment (BTA) team. Paul Stonner volunteered to be the first of a rotating chair.
- Delivered the Technology Infrastructure Blueprint, which was completed by the Business Technology Alignment team.

ORGANIZATION TRANSFORMATION

- Successfully completed the Product Readiness Review for the Jamcracker platform for Human Resource Modernization, which will integrate Perform.com onto the platform.
- Completed the Action Plan for Training Delivery Tools, which includes a revised business case for the Learning Management System (LMS) and outlines a plan for implementing process changes associated with LMS.
- Completed the Learning Consultant Definition, which documented the early planning stages for developing this role within SFA University. This included materials for working sessions and future steps to enhance this position.
- Completed the development of tools, templates, checklists and job aids to be used during the Plan It! Phase of the SFA University training lifecycle.
- Completed the Career Zone Performance Management Review, which includes survey instruments and tracking tools developed to measure employee satisfaction with the Career Zone.
- Created and delivered "Building An Effective Business Case" to a group of SFA staff as part of the Career Zone Skill Exchange series.
- Planned and facilitated working sessions for training development teams to implement the new standard training development process.

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PROGRAM MANAGEMENT
- Assisted in receiving approval for the funding of the following business cases from the Investment Review Board: Financial Partners Data Mart, Program Management and Leadership, Debt Management Collection System Replacement, Security and Privacy Program Support, EAI Release 3, and ITA Release 3.
- Developed a strawman design for a reengineered NSLDS as a basis for discussion at an SFA/Industry focus group at the EAC in Baltimore, MD.
- Helped to identify a new portal/Siebel-based option for enabling electronic delivery of CDR's to schools.

SCHOOLS
- Implemented fixes to the eCampus Based System's Release 1 on November 27, 2001.
- Signed the Common Origination and Disbursement (COD) Shared in Savings deal.
- Conducted multiple presentations on COD at the Electronic Access Conference (EAC) held in Reno, Nevada & Baltimore, Maryland. Presentations included a "big picture" session, a session on the Common Record, and COD's impact to Pell and Direct Loan processing.
- Completed all Recommended Solution Documents (RSD's) and sent to SFA for final approval.
- Set the Data Encryption Options and performed Cost Benefit Analysis for COD.

STUDENTS
- Signed the eServicing Shared in Savings deal.
- Finalized Consistent Answers team's recommendations for future operating partners to support vision of new Customer Service Delivery Model and presented recommendations to Consistent Answers Project Sponsors and SFA's Director of Acquisitions and Contracts.
- Completed coding and testing of the "To-Be" Customer Service Delivery Model Simulation in conjunction with finalizing the "To-Be" Customer Service Delivery Operating Model Designs.

V. RISKS AND ISSUES

This section reports the issues and risks that are currently causing or could potentially cause a very significant impact on the Modernization Partner Program's goals.

Area	Consistent Answers for Customers/Students
Description	Need to get an extension approved to the existing work order (TO 77 WO5) to cover the activities associated with finalizing the SIS agreement and efforts associated with designing the first releases of the new Customer Service Delivery Model.
Impact	Modernization Partner will not be able to finalize the SIS agreement or begin developing the solution needed to achieve the savings.
Assistance Requested from SFA	Discussed with Jennifer Douglas the allocation of funds from the SIS pool. She was receptive to the idea, but needed to know how much would be needed. Will get back to her with an estimate.
Proposed Solution/ Mitigation Strategy	Possibility of SFA allocating funds from the SIS pool to partially cover the exposure during the first quarter of calendar year 2002.
Progress/ Resolution	Will be developing an estimate this week (December 3, 2001) in order to submit a request for an extension.

Area	Financial Partners
Description	Community involvement in the Lender Payment Process Redesign has not been as inclusive as necessary to solicit and integrate community interests.
Impact	Lender Payment Process Redesign that does not fully meet SFA and community needs. Delays in delivery of the project that impact savings associated with the retirement of the legacy FFEL system.
Assistance Requested from SFA	SFA is coordinating with the Education Finance Council (EFC) to coordinate community input on redesign topics.
Proposed Solution/ Mitigation Strategy	Solicit lender community inputs through topic based conference calls and community wide meetings.
Progress/ Resolution	Community conference calls began the week of November 26, 2001 and will continue the first two weeks of December. A 'road-map' that highlights the overall approach and reflects the community's inputs will be prepared and communicated in early January 2002.

Area	CIO Tech Arch - ITA
Description	ITA Release 3.0 Modernization funding has been approved by the IRB. An operational funding gap of $400,000 still remains for ITA Release 3.0 maintenance services.
Impact	Maintenance provides bug fixes, modifications and enhancements for services rolled out in previous releases. Without maintenance, this effort will not receive operational support for the ITA environment and product support for applications that are in production.
Assistance Requested from SFA	SFA provides funding for ITA Release 3.0 maintenance.
Proposed Solution/ Mitigation Strategy	SFA provides funding for ITA Release 3.0 maintenance.
Progress/ Resolution	Funding gap has been identified at the IRB. CIO will provide a comprehensive picture of the Operations funding gap by December 7, 2001.

Area	CIO Tech Arch - EAI
Description	EAI Release 3.0 Modernization funding has been approved by the IRB. An operational funding gap of $300,000 still remains for EAI Release 3.0 maintenance services.
Impact	Maintenance provides bug fixes, modifications and enhancements for services rolled out in previous releases. Without maintenance, this effort will not receive operational support for the EAI environment and product support for applications that are in production.
Assistance Requested from SFA	SFA provides funding for EAI Release 3.0 maintenance.
Proposed Solution/ Mitigation Strategy	SFA provides funding for EAI Release 3.0 maintenance.
Progress/ Resolution	Funding gap has been identified at the IRB. CIO will provide a comprehensive picture of the Operations funding gap by December 7, 2001.

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VI.   TASK ORDER STATUS REPORT SUMMARY

This section presents an extract of all "Red" assessed criteria. The extract is taken from the Bi-Weekly Task Order Status Reports. (See Appendix VI. for the more information on the Bi-Weekly Task Order Status Reports.)

Task Order	Assessment Criteria	Assessment	Comments
TO 77 WO 02 - Common Origination & Disbursement	Overall	Red	The overall project status remained red due to delays in defining COD requirements. These activities are 100% complete. All 14 of 14 RSD's have been finalized and are pending sign-off. Target completion by 11/15. Development is complete for Release 1.0a and underway for Release 1.0b. Delays encountered with the FMS & DLSS interfaces, Common Record and On Line.